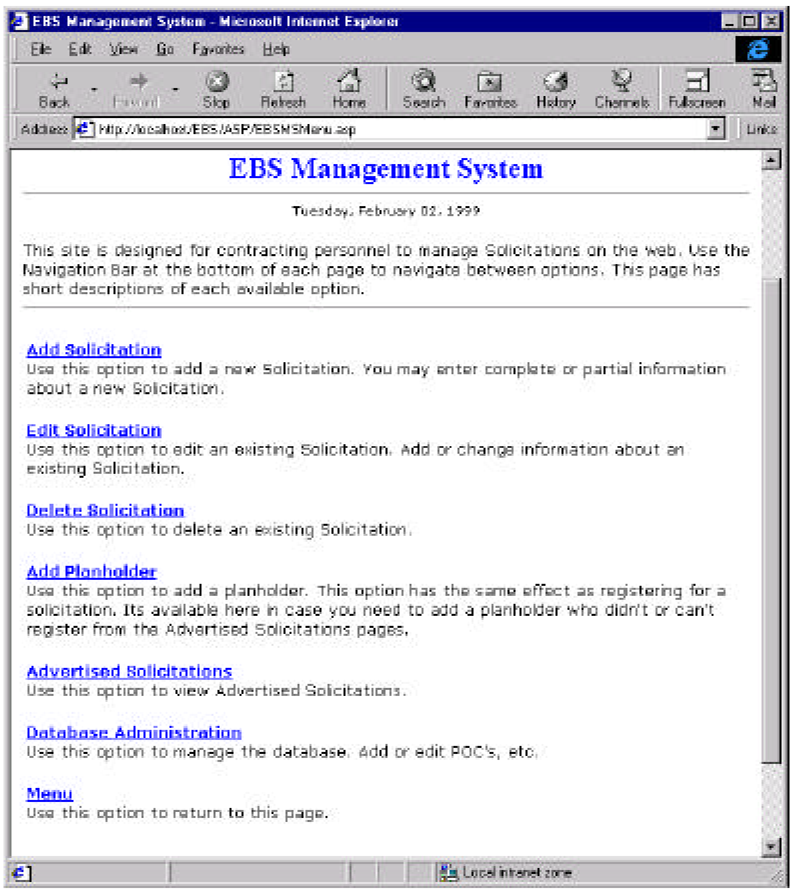
Electronic Bid Solicitations Management System (EBSMS)

User's Guide



Electronic Bid Solicitations Management System (EBSMS)

The purpose of EBSMS is to aid Contracting personnel in entering bid solicitation information to display on the EBS web pages. EBSMS was developed using Active Server Pages (ASP) technology. Visual Basic Script and Java Script are used throughout the pages to pass information to the EBS database. All of the information entered in EBSMS is stored in an Access Database named EBS.mdb.

Because EBSMS is a set of web pages, it can be used from anywhere you can access the Internet.

To begin using EBSMS you will need to know the web location of the EBSMS pages. Consult with your system administrator for the URL. The URL should be similar to the one shown below.

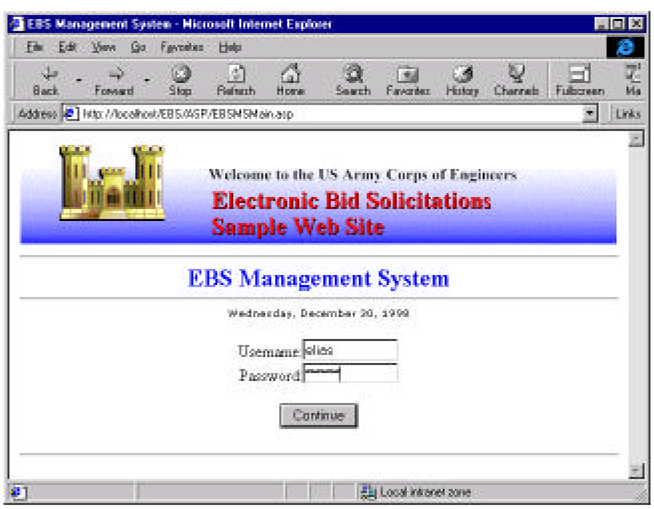
http://localhost/EBS/ASP/EBSMSMain.asp

Localhost is the name of the server where the pages reside. Your system administrator may have set a link to this location.

Log In

To log in to EBSMS you will need a username and a password. If you don t already have a username and a password ask your system administrator to assign you one. Instructions for adding usernames and passwords are included with the **EBS Web Site Installation Instructions.**

Enter your username and password then click on the Continue button.



The system will verify your username and password by comparing your entries to the list in the Users table in the database. If your username and password combination is not found you will see the following message.

Invalid Username/Password Combination

If you get this message you either entered your username and/or password incorrectly or your username and password are not in the database. If the message persists see your system administrator.

If your username and password combination is found you will see the following screen.

Click on the Enter EBSMS Menu button to continue.

Available Options

After successfully entering your username and password you will get a menu of available options. The available options are:

Add Solicitation
Edit Solicitation
Delete Solicitation
Add a Planholder
Advertised Solicitations
Database Administration
Menu

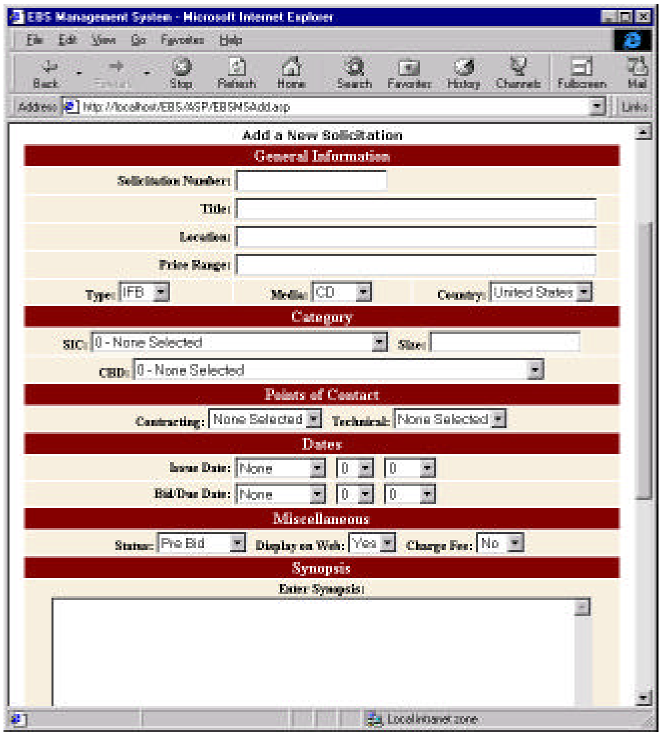
These options also appear on a navigation bar at the bottom of the page. The navigation bar appears on every EBSMS page.

Add Solicitation	Edit Solicitation	Delete Solicitation	Add Planholder	Advertised Solicitations		Database Administration	Menu

The following sections cover each option in detail.

Add Solicitation

This form is used to enter information about a new solicitation.



General Information

Solicitation Number – to enter a solicitation number click in this field and type it in. A solicitation number must be entered before adding a new solicitation to the database. Once the solicitation is added to the database this field cannot be edited.

Title – to enter a title click in this field and type it in.

Location – to enter a location click in this field and type it in.

Price Range – to enter a price range click in this field and type it in.

Type – to select a type click on the down-arrow and click on one of the options. The default type is IFB and will be selected automatically unless you choose a different type. The options for this field are read from the table Solicitation Type. Types can be added or deleted by editing this table.

Media – to select a media click on the down-arrow and click on one of the options. The default media is CD and will be automatically selected unless you choose a different media. The options for this field are read from the table Media. Mediums can be added or deleted by editing this table.

Country – to select a country click on the down-arrow and click on one of the options. The default country is United States and will be selected automatically unless you choose a different country. The options for this field are read from the table Country. Countries can be added or deleted by editing this table.

Category

SIC – to enter a SIC code click on the down-arrow and click on one of the codes. The options for this field are read from the table SIC. SIC codes can be added or deleted by editing this table. Since there are a large number of SIC codes (1517) it is recommended that you edit this table and delete the codes that you will never use. Currently the SIC code is not displayed on the web.

Size – to enter a size click in this field and type it in. Currently the size is not displayed on the web.

CBD – to enter a CBD code click on the down-arrow and click on one of the codes. The options for this field are read from the table CBD. CBD codes can be added or deleted by editing this table. Since there are a large number of CBD codes (101) it is recommended that you edit this table and delete the codes that you will never use. Currently the CBD code is not displayed on the web.

Points of Contact

Contracting – to enter a contracting point of contact click on the down-arrow and click on one of the options. The options for this field are read from the table POCs. Contracting points of contact can be added or deleted by editing this table. Contracting POCs are only displayed on the web if one is selected.

Technical – to enter a technical point of contact click on the down-arrow and click on one of the options. The options for this field are read from the table POCs. Technical points of contact can be added or deleted by editing this table. Technical POCs are only displayed on the web if one is selected.

See the section **Add POC** for instructions on how to add a point of contact.

Dates

Issue Date – to enter an issue date click on each of the three down-arrows and click on a month, date, and year. An issue date must be entered before adding a new solicitation to the database.

Bid/Due Date – to enter a bid/due date click on each of the three down-arrows and click on a month, date, and year. A bid/due date must be entered before adding a new solicitation to the database.

These fields were designed as pull-down menus to ensure a consistent format for the date and to be Y2K compliant.

The dates are used to determine when to display a solicitation on the web. Solicitation information is displayed as soon as it is entered. Plans and specifications are not displayed until the issue date. The solicitation is not displayed on the web after the bid/due date.

Miscellaneous

Status - to select a status click on the down-arrow and click on one of the options. The default status is Pre Bid and will be selected automatically unless you choose a different status. The options for this field are read from the table Status. Status options can be added or deleted by editing this table. The status is used to determine how to display the solicitation information on the web.

Pre Bid solicitations are displayed until the bid/due date. Post Bid solicitations are not displayed until they are awarded. Postponed solicitations are displayed at the bottom of the solicitation table and are marked as postponed. Awarded solicitations are displayed on a separate page.

Display on Web – to select a display-on-web option click on the down-arrow and click on one of the options. The default option is Yes and will be selected automatically unless you choose a different option. The options for this field are read from the table YesOrNo. This option is used to determine whether or not to display a solicitation on the web.

Charge Fee – to select a charge fee option click on the down-arrow and click on one of the options. The default option is No and will be selected automatically unless you choose a different option. The options for this field are read from the table YesOrNo. This option is used to mark solicitations for which there is a charge. This information is currently not displayed on the web.

Synopsis

Enter Synopsis – to enter a synopsis click in this field and type it in. You can also paste text into this field and use html tags.

Conference

Enter Conference Information – to enter conference information click in this field and type it in. You can also paste text into this field and use html tags.

Conference Date – to enter a conference date click on each of the three down-arrows and click on a month, date, and year.

These fields were designed as pull-down menus to ensure a consistent format for the date and to be Y2K compliant.

Submit Solicitation

Click on the Add This Solicitation button to add the solicitation to the database.

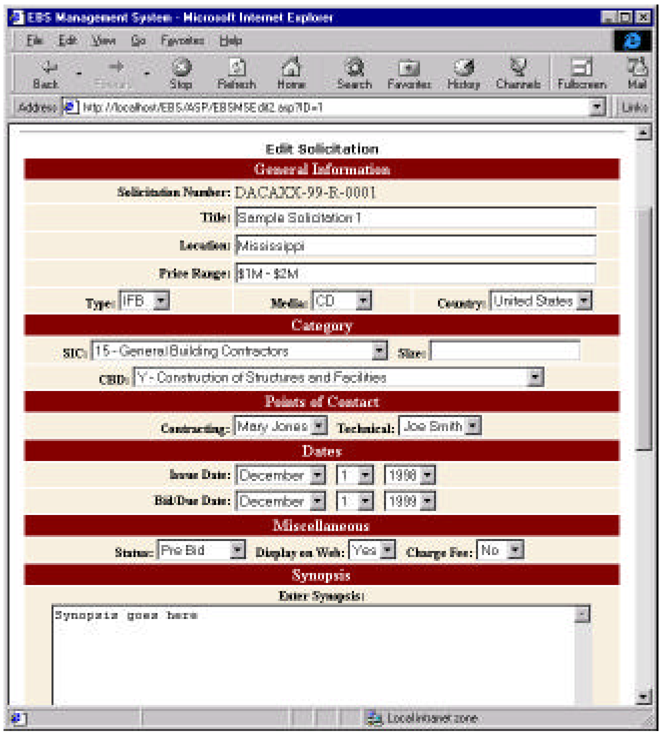
The solicitation will be written to the database only if the minimum required information (Solicitation Number, Issue Date, and Bid/Due Date) has been entered. If the minimum information is not entered, an alert box will appear.

If this message appears enter the requested information and click on the Add This Solicitation button again.

Once a solicitation has been entered it can be edited or deleted later. See sections **Edit Solicitation** and **Delete Solicitation.**

Edit Solicitation

This form is used to edit information about an existing Solicitation.



General Information

Solicitation Number – the solicitation number cannot be edited. If you need to change the solicitation number delete the solicitation and enter it again.

Title – to edit a title click in this field and edit it.

Location – to edit a location click in this field and edit it.

Price Range – to edit a price range click in this field and edit it.

Type – to edit a type click on the down-arrow and click on a different option.

Media – to edit a media click on the down-arrow and click on a different option.

Country – to edit a country click on the down-arrow and click on a different option.

Category

SIC – to edit a SIC code click on the down-arrow and click on a different code.

Size – to edit a size click in this field and edit it. Currently the size is not displayed on the web.

CBD – to edit a CBD code click on the down-arrow and click on a different code.

Points of Contact

Contracting – to edit a contracting point of contact click on the down-arrow and click on a different option.

Technical – to edit a technical point of contact click on the down-arrow and click on a different option.

If the point of contact you are looking for is not listed, it needs to be added to the database. See the section **Add POC** for instructions on how to add a point of contact.

Dates

Issue Date – to edit an issue date click on each of the three down-arrows and click on a different month, date, or year. An issue date must be entered before updating a solicitation.

Bid/Due Date – to edit a bid/due date click on each of the three down-arrows and click on a different month, date, or year. A bid/due date must be entered before updating a solicitation.

The dates are used to determine when to display a solicitation on the web. Solicitation information is displayed as soon as it is entered. Plans and specifications are not displayed until the issue date. The solicitation is not displayed on the web after the bid/due date.

Miscellaneous

Status - to edit a status click on the down-arrow and click on a different option. If you change a solicitation status to Awarded you should also enter a contract number and an award date. See section **Award Information** below.

Pre Bid solicitations are displayed until the bid/due date. Post Bid solicitations are not displayed on the web until they are marked as Awarded. Postponed solicitations are displayed at the bottom of the solicitation table and are marked as postponed. Awarded solicitations are displayed on a separate page.

Display on Web – to edit a display-on-web option click on the down-arrow and click on a different option. This option is used to determine whether or not to display a solicitation on the web. This option can be used to temporarily remove a solicitation from the web without actually deleting it.

Charge Fee – to edit a charge fee option click on the down-arrow and click on a different option. This option is used to mark solicitations for which there is a charge. This information is currently not displayed on the web.

Synopsis

Enter Synopsis – to edit a synopsis click in this field and edit it. You can also paste text into this field and use html tags.

Conference

Enter Conference Information – to edit conference information click in this field and edit it. You can also paste text into this field and use html tags.

Conference Date – to edit a conference date click on each of the three down-arrows and click on a different month, date, or year.

These fields were designed as pull-down menus to ensure a consistent format for the date and to be Y2K compliant.

Add an Amendment

Amendment Number – to add an amendment number click in this field and type it in.

Amendment Date - to enter an amendment date click on each of the three down-arrows and click on a month, date, and year.

Award Information

Contract Number – to enter a contract number click in this field and type it in.

Award Date - to enter an award date click on each of the three down-arrows and click on a month, date, and year.

If you enter a contract number and award date you should also change the status to Awarded. See section **Miscellaneous** above.

Update Solicitation

Click on the Update This Solicitation button to update the solicitation.

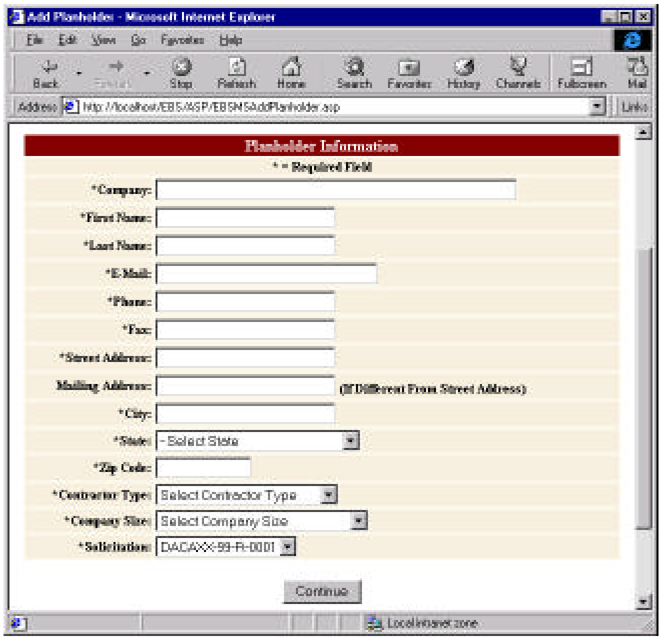
Delete Solicitation

This form is used to delete an existing Solicitation.

To delete a solicitation click on the Solicitation Number. After clicking on a Solicitation Number you will see a form that displays the solicitation information so you can confirm that you really want to delete it. Once a solicitation is deleted it cannot be restored.

Add Planholder

This form is used to add a planholder. This option has the same effect as registering for a solicitation on the EBS web site. It is available here in case you need to add a planholder who didn't or can't register from the Advertised Solicitations pages on the EBS web site.



Planholder Information

Company – Click in this field and type in the plahnolder’s company name.

First Name – Click in this field and type in the planholder’s first name.

Last Name – Click in this field and type in the planholder’s last name.

E Mail – Click in this field and type in the planholder’s e-mail address.

Phone – Click in this field and type in the planholder’s phone number.

Fax – Click in this field and type in the planholder’s fax number.

Street Address – Click in this field and type in the planholder’s street address.

Mailing Address – Click in this field and type in the planholder’s mailing address if it is different from the street address.

City – Click in this field and type in the planholder’s city.

State – Click on the down-arrow and select the plahnolder’s state.

Zip Code – Click in this field and type in the planholder’s zip code.

Contractor Type – Click on the down-arrow and select the plahnolder's contractor type. The options for this field are read from the table ContractorType. Contractor types can be added or deleted by editing this table.

Company Size – Click on the down-arrow and select the plahnolder's company size. The options for this field are read from the table CompanySize. Company sizes can be added or deleted by editing this table.

Solicitation – Click on the down-arrow and select the solicitation the planholder is registering for.

Submit Planholder

Click on the Continue button to add the planholder to the database.

The planholder will be written to the database only if all the required information has been entered. If the required information is not entered, an alert box will appear.

If this message appears click OK to dismiss the message. Enter the requested information and click on the Continue button again.

Advertised Solicitations

Use this option to view Advertised Solicitations so you can view the changes you just made.

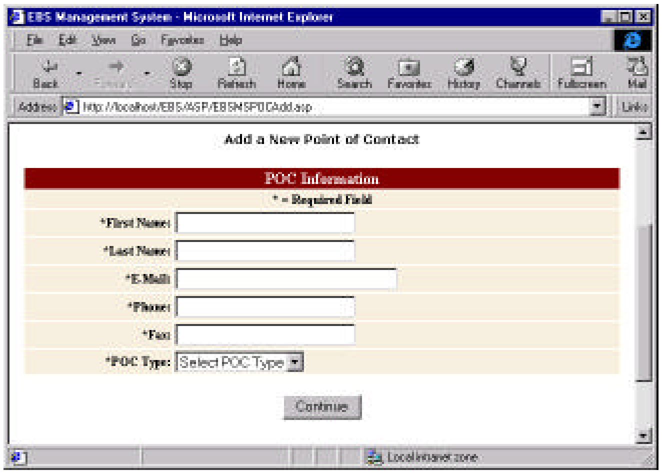
Database Administration

The following options are available under database administration:

Add POC
Edit POC
Delete POC
Edit Mail Room

Add POC

This form is used to add a Point of Contact.



First Name – to enter a first name click in this field and type it in.

Last Name – to enter a last name click in this field and type it in.

E-Mail – to enter an e-mail address click in this field and type it in.

Phone – to enter a phone number click in this field and type it in.

Fax – to enter a fax number click in this field and type it in.

POC Type – to select a POC type click on the down-arrow and click on one of the options. The options for this field are read from the table POCType. POC types can be added or deleted by editing this table.

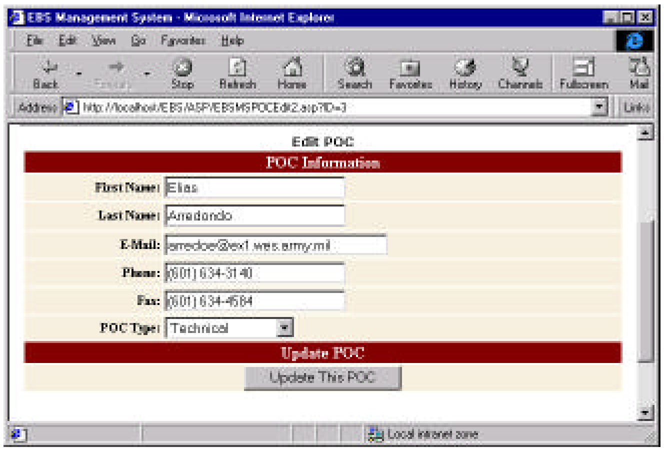
Click on the Continue button to add the POC to the database.

The POC will be added to the database only if all the required information has been entered. If the required information is not entered, an alert box will appear.

If this message appears click OK to dismiss the message. Enter the requested information and click on the Continue button again.

Edit POC

This form is used to edit an existing Point of Contact. When you select this option a table with all the Points of Contact in the database is displayed. Select the one you want to edit. The current information for the selected Point of Contact will be displayed.



First Name – to edit the first name click in this field and edit it.

Last Name – to edit the last name click in this field and edit it.

E-Mail – to edit the e-mail address click in this field and edit it.

Phone – to edit the phone number click in this field and edit it.

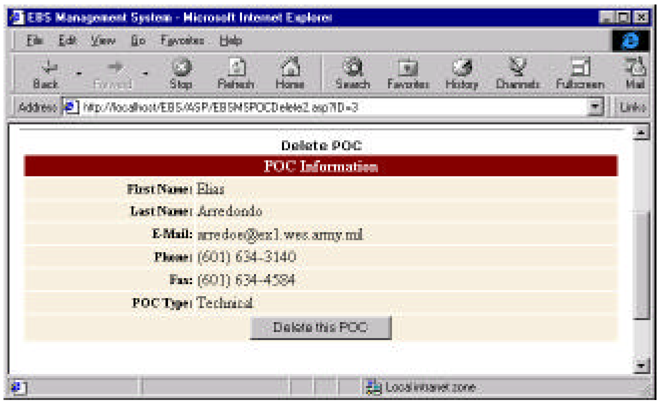
Fax – to edit the fax number click in this field and edit it.

POC Type – to edit the POC type click on the down-arrow and click on a different POC type.

Click on the Update this POC button to update the POC in the database.

Delete POC

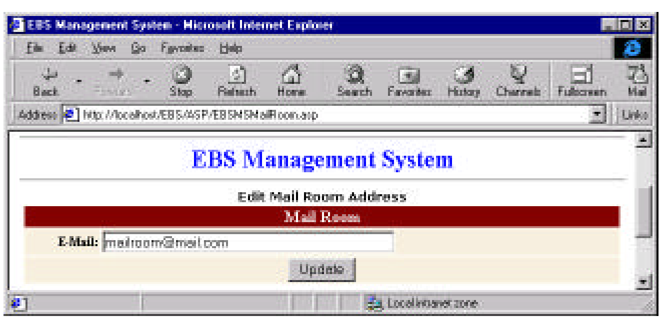
This form is used to delete an existing Point of Contact. When you select this option a table with all the Points of Contact in the database is displayed. Select the one you want to delete. The current information for the selected Point of Contact will be displayed so you can verify that you really want to delete it.



Click on the Delete this POC button to confirm that you want to delete this POC. Once you delete a POC from the database you can not restore it. However, you can enter it again as a new POC.

Edit Mail Room

This form is used to edit the e-mail address of the mailroom. When someone registers for a solicitation on the web, an e-mail message is sent to the contracting point of contact and to this mailroom e-mail address.



E-Mail – to edit the e-mail address click in this field and edit it.

Note: You may enter multiple addresses separated by a semicolon (;)

Click on the Update button to update the e-mail address. This address is saved in the table MailRoom in the database.